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### Age Defining Life Stage Traveling: Montana Nonresident Travel Groups

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# Age Defining Life Stage Traveling

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## Montana Nonresident Travel Groups

Kara Grau, Norma Nickerson

6/8/2017



Data collected via the Statewide Nonresident Travel Survey was segmented into groups representing a range of life stages, as defined by the ages represented within the travel group. The following summary provides a comparison of travel group characteristics based on these life stages.

## **Age Defining Life Stage Traveling: Montana Nonresident Travel Groups**

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Research Report 2017-5

6/8/2017

This study was funded by the Lodging Facility Use Tax

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## Abstract

In this analysis of the 2015 full year data set, respondents were segmented by age, or life stage, according to the age groups represented within the groups. These discrete groups were then analyzed so that differences and similarities among travel groups of differing life stages could be observed.

## Executive summary

Six life stages were extracted from the Montana nonresident visitor data set to determine if difference existed based on their age group and those with children. The six life stages were groups with children, and groups without children in the following ages: 18-34 yrs. old; 35-54 yrs. old; 55-64 yrs. old; 65 +; and adult groups with mixed ages. There were more similarities than differences, but notable differences did emerge.

- Groups with children (56%) and mixed-age adults (53%) were more likely to be in MT for vacation than the other four groups and also spent more on their trip in Montana. These two groups spent slightly over \$1,000 each while the other groups' spending ranged from a low of \$508 to a high of \$766 in Montana.
- The 65+ age group and those with children had the longest length of stay (5.84 and 5.07 nights respectively).
- Yellowstone and Glacier were the highest two sites visited by all life stage groups and were also the main attractions to the state.
- Groups with children had higher participation rates in more activities than the other groups. However, groups with children and the 18-34 yr. olds were more likely to go day hiking than other groups. The 65+ group was most likely to camp and the 18-34 and 35-54 year old groups were significantly more likely to visit local breweries than the other groups.
- Information sources used while in the state showed that 18-34 year olds used map applications, 35-54 year olds used mobile apps, 55-64 year olds used maps applications followed by official highway information signs and the 65+ group was more likely to get information from visitor information centers than the other groups. Groups with kids used the highest variety of information sources during their trip.
- The percent of nights spent in hotels or motels was highest for each age group except for the 18-34 year olds who stayed the most at the home of a friend or relative (36%). This group also spent more nights camping on public lands (9%) compared to the other groups. The 65+ age group spent more nights in private campgrounds (21%) compared to other groups.
- Groups with children and the younger adult group aged 18-34 were more likely to have someone in their travel group who had never been to Montana before.
- Income differed significantly between groups. While 15% of 18-34 year olds and 26% of retirees (age 65+) made \$100,000 or more, 40% to 52% of the remaining groups made that amount.
- In total eight states (California, Colorado, Idaho, Minnesota, North Dakota, Utah, Washington, and Wyoming) and one province (Alberta) were represented with 5% or more visitors to the state. Washington State was the most frequently represented state across all life stage groups with children had the highest number from Washington at 15% followed by the 18-34 year olds at 14% of their group from Washington.
- The data suggests that marketing to groups with children and mixed-adult age groups represent the high value visitor (fewer people spending more money). Additionally these groups appear to be more likely to purchase locally made goods and services, adding to the Montana economy.

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## Introduction

In this analysis of the 2015 full year data set, respondents were segmented by age, or life stage, according to the age groups represented within the groups. These discrete groups were then analyzed so that differences and similarities among travel groups of differing life stages could be observed.

## Purpose

The purpose of this data mining was to further our understanding of the differences and similarities of visitors to Montana based on their life stage as determined by their travel group ages. Variables in the data set for comparison included travel group characteristics, trip planning, demographics, activities and attractions to Montana, and spending by life stage.

## Methods

For this analysis data were segmented into six travel group life-stages:

- 1) Groups with children under 18 (n=516)
- 2) 18-34 year olds w/o children (n=248)
- 3) 35 to 54 year olds w/o children (n=556)
- 4) 55 to 64 year olds w/o children (n=811)
- 5) 65 and older w/o children (n= 871)
- 6) Groups with mixed-age adults w/o children (n=772)

Life stages as defined in this report separated visitor groups who traveled with children under 18 from the other adult groups who were further segmented by age. One travel group, the mixed-age adult group contained people with ages that spread between the artificial age separations that we assigned to achieve distinct groups (no overlap) for analysis.

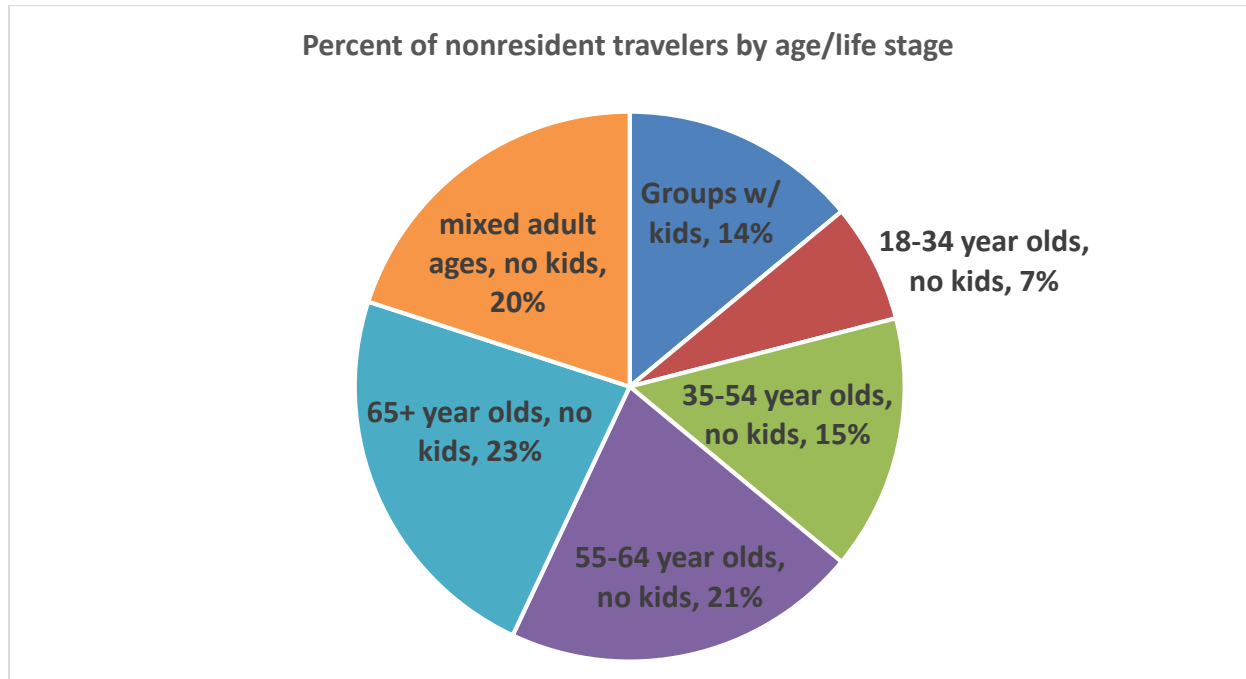
## Results

The following tables and figures highlight the results of the analysis and point to the similarities and differences between the six life stage groups. Total visitor numbers for this analysis was 3,774.

Travelers in the 65+ category traveling without children make up the largest segment of nonresident travelers (23%). Young adults (18-34) traveling without children are the smallest portion of travelers, making up only seven percent of nonresident visitors to Montana (Figure 1).

Table 1 displays distribution throughout the year of each traveler segment. Groups with children were much more likely to visit during the summer months of the 3<sup>rd</sup> quarter (51%). In fact, the 3<sup>rd</sup> quarter is the time segment when each group is most likely to visit Montana. However, 18-34 year olds were equally likely to visit in the second quarter as the third quarter.

**Figure 1 – Nonresident travelers by age/life stage**

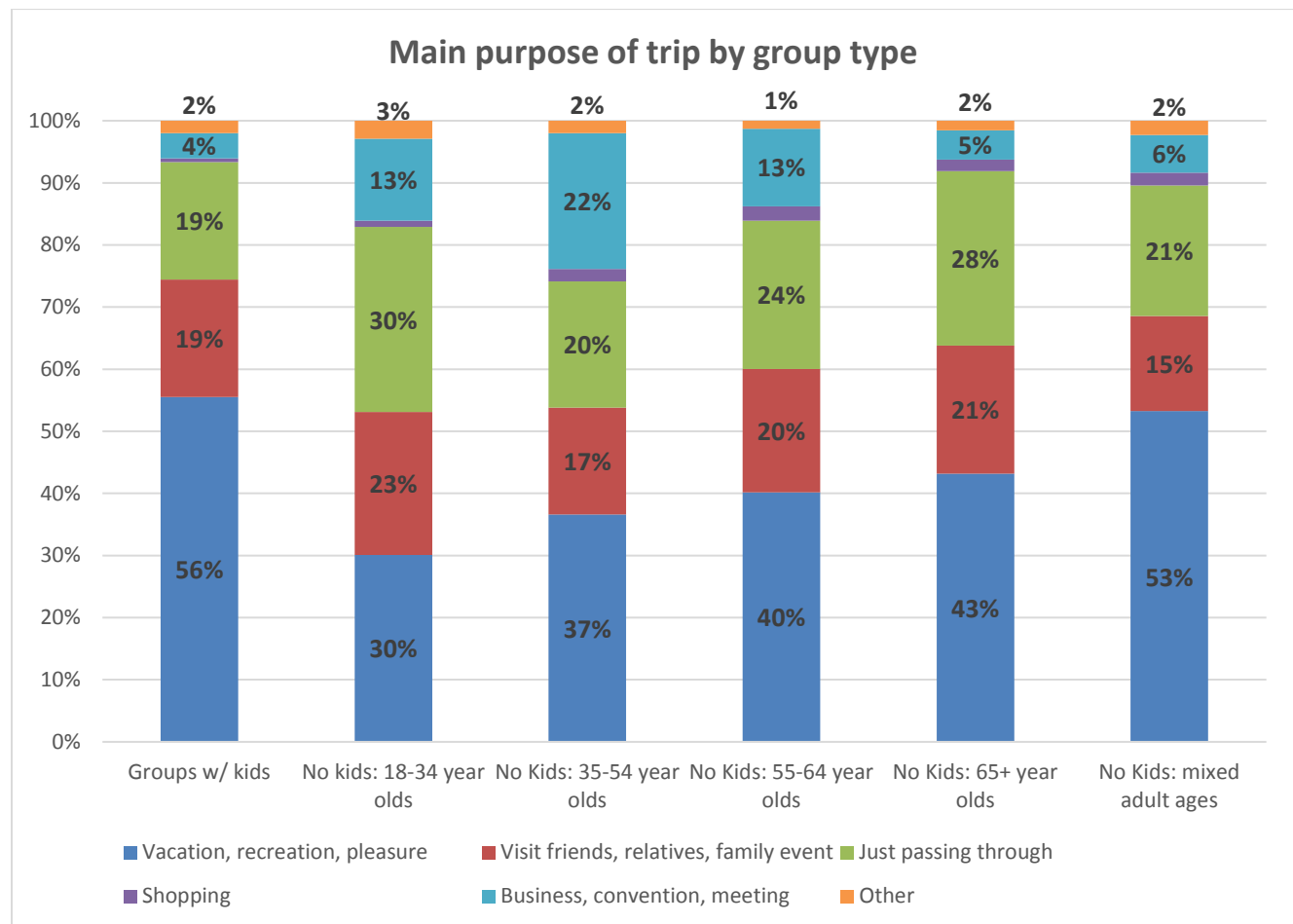


**Table 1 –Visitors by Quarter**

Quarter of Visit	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
<b>1 (Jan-Mar)</b>	16%	22%	26%	16%	13%	15%
<b>2 (Apr-Jun)</b>	25%	<b>29%</b>	25%	26%	27%	26%
<b>3 (Jul-Sep)</b>	<b>51%</b>	<b>29%</b>	<b>31%</b>	<b>39%</b>	<b>46%</b>	<b>46%</b>
<b>4 (Oct-Dec)</b>	7%	20%	19%	18%	14%	13%
	100%	100%	100%	100%	100%	100%

Travel groups with kids have a higher percentage of vacationers (56%) followed by the mixed adult age group (53%) than do the other travel groups. The 35 to 54 year old group has a higher percentage of business travelers than do any of the other groups (22%) while the 18-34 year old group has the highest percent of passing through the state at 30 percent (Figure 2).

**Figure 2 - Main purpose of trip by travel group**



Travel groups with children have the largest group size (4.00 people per group), while the 35 to 54 year old groups have the smallest (1.58 people per group) (Table 2).

The shortest visits were by the young adults (18 to 34 year olds), with an average trip length of 4.67 days. Conversely, the oldest travelers, 65 and older, stayed the longest—5.84 days. These older travelers also spent less per day, on average, than most of the other travel group segments (\$131.29 per group, per day). When comparing total trip spending, young adults (18-34 year olds) with no children in the group spent the least per trip (\$508.50), while groups of mixed-age adults without children (\$1,042.03) and groups with children (\$1,064.15) spent the most (Table 2).

In comparing visitor numbers by life stage to their spending, we see that two life stage groups have a lower percent of the visitor population but spend more than their population. In other words groups with kids make up 14 percent of visitors (Figure 1) but 18 percent of spending. Mixed-age adult groups make up 20 percent of visitors (Figure 1) but 26 percent of the spending (Table 2). The other four groups have a greater group size than their spending indicating that their contribution is less than desired for the number of people in their group (Figure 1 and Table 2).



**Table 2- Average group size, length of stay, and group spending**

	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
<b>Group Size</b>	<b>4.00</b>	<b>1.74</b>	<b>1.58</b>	<b>1.73</b>	<b>1.88</b>	<b>2.46</b>
<b>Campground, RV Park</b>	\$1.65	\$0.91	\$1.13	\$1.63	\$2.39	\$1.22
<b>Hotel, B&amp;B, etc.</b>	\$14.75	\$9.04	\$17.48	\$15.63	<b>\$13.66</b>	\$19.58
<b>Rental Cabin, Condo</b>	\$10.82	\$3.10	\$2.00	\$1.01	\$1.99	\$3.85
<b>Gasoline, Diesel</b>	\$24.00	<b>\$20.58</b>	<b>\$25.96</b>	<b>\$28.45</b>	<b>\$28.04</b>	\$25.21
<b>Restaurant, Bar</b>	<b>\$35.22</b>	<b>\$18.41</b>	<b>\$30.38</b>	<b>\$25.84</b>	<b>\$22.30</b>	<b>\$34.42</b>
<b>Farmers Market</b>	\$1.76	\$0.34	\$0.48	\$1.19	\$1.06	\$0.87
<b>Groceries, Snacks</b>	\$19.85	\$11.60	\$14.84	\$11.76	\$12.03	\$15.95
<b>Retail Sales</b>	\$23.35	\$8.51	\$22.48	<b>\$17.11</b>	\$13.20	\$20.44
<b>Outfitter, Guide</b>	<b>\$29.07</b>	\$0.41	\$6.05	\$10.16	\$10.16	<b>\$28.29</b>
<b>Auto Rental</b>	\$4.09	\$4.23	\$8.23	\$4.55	\$2.47	\$5.53
<b>Auto Repair</b>	\$0.51	\$0.57	\$0.13	\$0.46	\$1.31	\$0.48
<b>Transportation Fares</b>	\$0.00	\$0.00	\$0.13	\$0.01	\$0.04	\$0.13
<b>Licenses, Entrance Fees</b>	<b>\$25.52</b>	<b>\$16.20</b>	<b>\$25.08</b>	\$12.17	\$12.20	<b>\$26.78</b>
<b>Gambling</b>	\$0.13	\$0.37	\$0.60	\$1.34	\$0.87	\$1.02
<b>Misc. Services</b>	\$0.91	\$0.73	\$1.14	\$0.65	\$0.49	\$0.53
<b>Made in MT</b>	<u>\$18.26</u>	<u>\$13.90</u>	<u>\$12.45</u>	<u>\$13.15</u>	<u>\$9.09</u>	<u>\$16.47</u>
<b>Total Daily Spending</b>	<b>\$209.89</b>	<b>\$108.89</b>	<b>\$168.58</b>	<b>\$145.11</b>	<b>\$131.29</b>	<b>\$200.78</b>
<b>Length of Stay</b>	<b>5.07</b>	<b>4.67</b>	<b>4.58</b>	<b>4.69</b>	<b>5.84</b>	<b>5.19</b>
<b>Total Trip Spending</b>	<b>\$1,064.15</b>	<b>\$508.50</b>	<b>\$772.09</b>	<b>\$680.56</b>	<b>\$766.76</b>	<b>\$1,042.03</b>
<b>Total sample spending</b>	\$549,101	\$126,108	\$429,282	\$551,934	\$667,848	\$804,447
<b>% of total</b>	18%	4%	14%	18%	21%	26%

## Age Defining Life Stage Traveling **2017**

All of the life stage groups visited a variety of places and took part in a diversity of activities, regardless of life stage. Yellowstone National Park was the most commonly visited site, while Glacier National Park was the second most commonly visited site among all groups. Either hot springs or other Montana state parks were the third most common sites for these age groups to visit (Table 3).

**Table 3 - Montana sites visited**

Sites visited in Montana	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
Yellowstone National Park	60%	56%	51%	50%	56%	59%
Glacier National Park	36%	40%	32%	33%	36%	37%
Other Montana state parks	14%	14%	14%	16%	14%	13%
Hot springs	13%	20%	12%	12%	9%	14%
Grizzly & Wolf Discovery Center, West Yellowstone	12%	6%	4%	1%	4%	5%
Flathead Lake State Parks	8%	13%	10%	10%	9%	9%
Little Bighorn Battlefield	8%	7%	8%	15%	13%	12%
Museum of the Rockies, Bozeman	7%	4%	9%	7%	3%	4%
Lewis & Clark Interp. Center, Great Falls	7%	2%	2%	4%	7%	4%
Ghost towns	5%	7%	5%	5%	5%	6%
National Bison Range	4%	5%	7%	8%	7%	5%
Lewis & Clark Caverns State Park	4%	7%	5%	5%	2%	3%
Virginia City/Nevada City	4%	2%	1%	6%	8%	5%
Bighorn Canyon Nat'l Recreation Area	2%	3%	4%	4%	4%	3%
Montana Historical Museum, Helena	1%	2%	1%	3%	2%	1%
Rocky Mountain Elk Foundation	1%	3%	2%	1%	3%	1%
Lolo Pass Interpretive Center	1%	5%	3%	4%	5%	4%
Big Hole Battlefield	1%	1%	1%	3%	5%	2%
Ft. Peck Interpretive Center & Museum	1%	<1%	<1%	1%	1%	<1%
Missouri Headwaters State Park	1%	3%	1%	3%	4%	4%
C.M. Russell Museum, Great Falls	1%	1%	1%	2%	5%	1%
Fort Peck Lake	1%	1%	3%	2%	2%	1%
Bob Marshall Wilderness Complex	<1%	2%	1%	3%	2%	1%
Pompey's Pillar	<1%	1%	1%	3%	4%	4%
Missouri River Breaks Nat'l Monument	<1%	1%	1%	<1%	2%	1%
Clark Canyon Reservoir	<1%	2%	2%	3%	2%	1%
C.M. Russell National Wildlife Refuge	<1%	<1%	1%	1%	1%	1%

Scenic driving was the most common activity participated in, regardless of life stage or age of the group. Day hiking was the second most popular activity for all but the mixed adult (no children) group and the 65 and older group, for whom wildlife watching and nature photography, respectively, were more popular.

There are a few notable differences in participation in several of the activities by the different types of groups. The circled percentages reflect obvious differences (much higher participation) between life stage groups as seen across the rows. Overall, travel groups which include children had higher participation in activities during their trip than did the other life stage (Table 4).

Those in the young adult group (18-34 years old) with no children along were more likely to have visited a local brewery (33% compared to a low of 9% for 65+ year old group) and a distillery (8% compared to just 2-4% of the other groups). These young adults were also more likely to have gone backpacking in the state (9% compared to just 1-5% of other groups) and quite a bit less likely to have visited Lewis and Clark sites (3% compared to 9-17%).

Retirees (65 and older) had the highest participation in visits to Lewis and Clark sites (17%) and camping (35%). The only distinguishing activity participation for 35-54 year olds was their visits to breweries (22%). Likewise, the 55-64 age group was slightly more likely to view art exhibits (9%) and/or motorcycle (7%).

**Table 4 - Activities participated in while in Montana**

Activities in Montana	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
Scenic driving	63%	58%	51%	56%	65%	59%
Day hiking	53%	52%	38%	38%	28%	39%
Wildlife watching	45%	36%	30%	33%	33%	42%
Nature photography	42%	42%	32%	33%	38%	41%
Recreational shopping	40%	25%	32%	28%	21%	34%
Car / RV camping	27%	28%	21%	28%	35%	22%
Visit other historical sites	23%	11%	16%	22%	25%	17%
Visit museums	22%	11%	12%	16%	18%	16%
Fishing/fly fishing	14%	7%	11%	9%	12%	14%
Visit local brewery	14%	33%	22%	15%	9%	18%
River rafting/floating	12%	3%	3%	4%	3%	8%
Attend festivals or special events	11%	9%	9%	10%	9%	9%
Visit Lewis & Clark sites	10%	3%	9%	12%	17%	11%
Horseback riding	10%	2%	2%	3%	1%	4%
Visit farmers market	8%	8%	6%	10%	8%	10%
Canoeing/kayaking	7%	3%	2%	3%	2%	3%
Skiing/snowboarding	7%	7%	4%	2%	2%	5%

**Table 4a - Activities participated in while in Montana, continued**

Activities in Montana	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
Dinosaur attraction	7%	3%	4%	3%	3%	2%
Birding	6%	4%	4%	7%	8%	7%
Mountain biking	5%	3%	3%	2%	1%	1%
Visit Indian reservations	5%	10%	8%	9%	6%	8%
Bicycling	5%	6%	3%	5%	4%	5%
Backpacking	5%	9%	3%	1%	1%	3%
View art exhibits	4%	4%	4%	9%	7%	6%
Motor boating	4%	2%	2%	3%	2%	3%
Sporting event	3%	4%	2%	3%	3%	1%
Geocaching	3%	2%	<1%	<1%	<1%	1%
OHV/ATV	3%	2%	3%	1%	1%	1%
Attended wedding	2%	3%	1%	1%	1%	3%
Visit local distillery	2%	8%	4%	3%	3%	3%
Attend performing arts	2%	4%	2%	2%	3%	2%
Rock hounding	2%	1%	2%	3%	2%	2%
Golfing	2%	2%	4%	5%	4%	4%
Snowmobiling	2%	<1%	3%	1%	<1%	1%
Motorcycle touring	2%	1%	4%	7%	2%	6%
Hunting	2%	2%	3%	2%	2%	3%
Road/tour biking	2%	1%	2%	3%	1%	1%
Rock climbing	1%	4%	1%	<1%	<1%	1%
Snowshoeing	1%	1%	<1%	1%	1%	1%
Cross country skiing	<1%	1%	<1%	1%	1%	1%

In terms of what attracted vacationers within these life stage travel groups to Montana, Yellowstone National Park and Glacier National park rank 1<sup>st</sup> or 2<sup>nd</sup> among all six groups, with the exception of vacationing travel groups with children, for which GNP ranked as the 3<sup>rd</sup> main attraction. For this group, family and friends is the 2<sup>nd</sup> most common main attraction to the state. Mountains and forests are the 3<sup>rd</sup> most common main attraction for groups of mixed age adults, as well as the 35 to 54 and 55 to 64 year old adult groups (Table 5).

**Table 5 – Main attraction to Montana for vacationers by life stage group**

Main Attraction	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
Yellowstone National Park	27%	22%	19%	21%	20%	20%
Family/friends	17%	15%	13%	15%	14%	11%
Glacier National Park	16%	23%	15%	19%	22%	19%
Open space/uncrowded areas	9%	12%	10%	10%	13%	10%
Mountains/forests	8%	9%	14%	16%	12%	15%
Skiing/snowboarding	7%	9%	3%	2%	2%	5%
Special events	3%	2%	2%	2%	2%	2%
Lakes	3%	2%	2%	1%	1%	2%
Rivers	2%	1%	3%	<1%	3%	1%
Resort/guest ranch	2%	1%	2%	1%	1%	1%
A Montana State Park	2%	<1%	2%	<1%	<1%	<1%
Wildlife	2%	<1%	1%	1%	2%	2%
Snowmobiling	1%	<1%	3%	<1%	<1%	<1%
Other Montana history & culture	1%	<1%	1%	2%	1%	2%
Fishing	1%	1%	4%	4%	4%	6%
Northern Great Plains/Badlands	1%	1%	<1%	1%	<1%	<1%
Native American history & culture	1%	3%	2%	1%	1%	1%
Hunting	<1%	2%	5%	2%	1%	3%
Lewis & Clark history	<1%	<1%	<1%	1%	2%	<1%

“Search engine” was considered to be the most useful source of information for planning their trip for all life stage groups. National Park information, along with “other” sources, were the second or third most useful for all groups (Table 6).

Differences across life stages are highlighted with the circle to indicate the group with the highest use of that type of information. The 55-64 year olds were most likely to come to Montana without searching for any information. The retirees (65+ age) were more likely to say ‘other’ as their source compared to the other life stage groups but the data does not allow for further description of ‘other.’ Finally, the life stage with children were slightly more likely to use the national park information than the other groups.

**Table 6 – Most useful sources of information for trip planning used by life stage group**

Most useful trip planning information sources	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
Used no sources	23%	32%	33%	40%	27%	26%
Search Engine	28%	32%	25%	19%	15%	23%
Other	11%	8%	10%	11%	15%	10%
National Park brochure/book/website	14%	8%	10%	6%	11%	11%
Consumer online reviews	4%	6%	1%	1%	1%	2%
Mobile Apps	1%	4%	5%	2%	3%	2%
Social media	1%	3%	2%	<1%	<1%	1%
Other travel websites	2%	3%	4%	3%	2%	3%
Official MT website	5%	2%	2%	4%	3%	6%
Info from private business	2%	1%	3%	3%	2%	3%
Guide book	2%	1%	2%	1%	1%	2%
Magazine/newspaper article	<1%	<1%	<1%	1%	2%	1%
Online Video	<1%	<1%	<1%	1%	<1%	<1%
Professional online travel reviews	<1%	<1%	1%	<1%	1%	1%
Automobile club	1%	<1%	1%	3%	10%	5%
Chamber/visitor bureau	<1%	<1%	1%	1%	2%	<1%
Montana advertising campaign	1%	<1%	<1%	<1%	<1%	<1%
Official MT guidebook	1%	<1%	<1%	2%	2%	1%
State Park brochure/website	<1%	<1%	<1%	1%	<1%	1%
Info from special event	2%	<1%	<1%	<1%	2%	1%

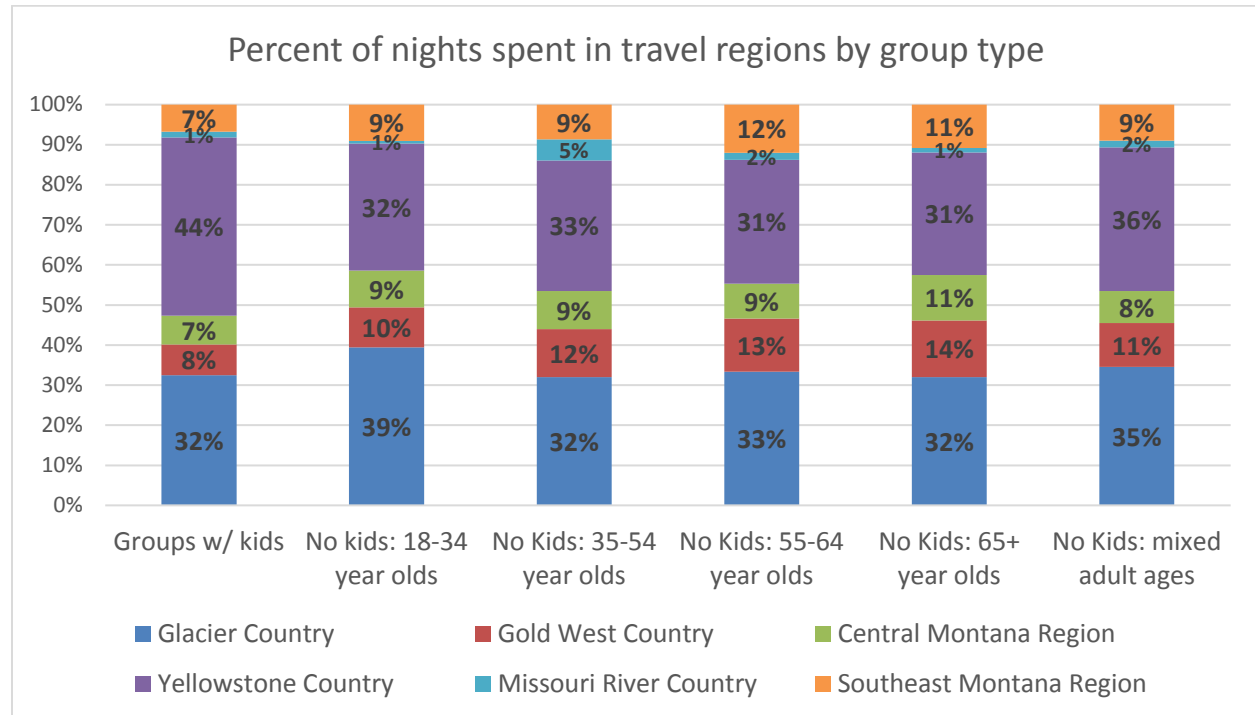
Map applications, such as Google Maps, was chosen as the most useful information source used while traveling by all life stage groups. Mobile apps were also useful to most groups, although the 65 and older travel group considered them less useful than all of the other travel groups (Table 7).

**Table 7 – Most useful information sources used during trip by life stage groups**

Most useful information sources during trip	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
Map applications (i.e., Google Maps)	28%	39%	28%	24%	21%	27%
Mobile Apps	12%	14%	20%	12%	9%	16%
Visitor information center staff	12%	11%	10%	11%	18%	12%
Motel/restaurant/gas station employee	10%	5%	11%	9%	7%	9%
Brochure information rack	10%	1%	5%	9%	12%	8%
Official highway information signs	7%	10%	6%	15%	11%	7%
Consumer online reviews (i.e., TripAdvisor)	6%	8%	6%	5%	4%	6%
Billboards	5%	3%	2%	2%	3%	2%
Official MT Guidebook Magazine	3%	1%	1%	5%	6%	5%
Official MT website (VisitMT.com)	3%	1%	3%	3%	5%	3%
Social media (i.e., Facebook)	2%	3%	4%	2%	2%	2%
Guidebook (i.e., Frommer's, Lonely Planet)	2%	3%	4%	2%	3%	2%

Glacier Country and Yellowstone Country travel regions account for the majority of nights spent in the state by each of the life stages (Figure 3). When combined, total nights in these two regions are large, ranging from a low of 63 percent (31% plus 32%) among those 65+, to a high of 76 percent among groups with kids.

**Figure 3 - Percent of nights spent in each travel region by life stage group**





Spending nights in a hotel/motel or at the home of a friend or relative are the top two places that groups in each life stage are likely to stay. However there are distinct differences in the percent of nights spent.

Nearly half of the nights spent by 35 to 54 year olds traveling without children were spent in hotels or motels. The next highest was the mixed age adults who spent 38 percent of their nights in hotels or motels. Groups with children were quite a bit more likely to have spent nights in a rented cabin or home (21% of nights spent) than were the other groups.

Total camping nights (public and private camping) was highest for the 65+ age group at 30 percent of their nights. Private campground nights are most likely to be the older visitors (55 and older) or the mixed adult ages. Nearly 20 percent of the nights spent in Montana by the young adult groups of 18 to 34 year olds were spent camping on public lands (Table 8).

Staying at the home of a friend or relative accounted for between 19 and 36 percent of the nights spent in Montana by these six travel group types with the 18-34 years olds spending the most nights in a private home.

**Table 8 - Percent of nights spent in various lodging types by life stage group**

Accommodation types	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
Hotel/motel	25%	25%	48%	37%	32%	38%
Home of friend/relative	22%	36%	22%	27%	22%	19%
Rented cabin/home	21%	4%	4%	4%	4%	10%
Public land camping	12%	19%	7%	7%	9%	8%
Private campground	8%	3%	8%	13%	21%	10%
Second home/cabin/condo	5%	2%	3%	7%	4%	7%
Resort/condominium	5%	1%	4%	2%	3%	5%
Vehicle in parking area	1%	4%	1%	1%	1%	0%
Bed & Breakfast	1%	3%	1%	1%	1%	1%
Other	1%	3%	2%	1%	2%	1%
Guest ranch	0%	0%	0%	1%	0%	1%

Table 9 demonstrates that groups with children are more likely than all other life stage groups to have at least one person or more in their travel group who is a first time visitor to Montana. As visitors get older, their group is more likely to be all repeat visitors.

Household Income levels (Table 9) generally follow age. The younger group without children have the least income followed by the visitors 65 years and older (retirees). Between these ages, the groups traveling with children tend to have the highest level of income followed by the 55-64 year olds and the mixed adult age group. The circled numbers represent the notable higher difference in income levels across life stages. Each column has the two highest income levels highlighted.

**Table 9 - Demographics: Percent of repeat visitor groups and household income**

Demographics	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
<b>All repeat visitor group</b>	53%	58%	70%	79%	87%	74%
<b>Percent at Household Income</b>						
Less than \$50,000	16%	43%	11%	16%	21%	16%
\$50,000 to less than \$75,000	18%	24%	17%	22%	32%	21%
\$75,000 to less than \$100,000	24%	18%	20%	21%	20%	23%
\$100,000 to less than \$150,000	20%	11%	30%	22%	15%	21%
\$150,000 to less than \$200,000	9%	2%	12%	10%	5%	10%
\$200,000 or greater	13%	2%	10%	8%	6%	9%

State or province of residence among life stage groups tend to be quite concentrated. Only eight states and one Canadian province are represented at levels of five percent or more in any group (Table 10). Washington, California, and Idaho are the three states represented by all life stages.

**Table 10 - Residence of visitors**

Visitor Residence of 5% or higher	Groups w/ kids	No kids: 18-34 year olds	No Kids: 35-54 year olds	No Kids: 55-64 year olds	No Kids: 65+ year olds	No Kids: mixed adult ages
<b>Alberta</b>	6%		8%	7%	7%	7%
<b>California</b>	5%	8%	9%	5%	9%	6%
<b>Colorado</b>		7%	6%	5%		
<b>Idaho</b>	10%	8%	11%	9%	8%	7%
<b>Minnesota</b>	6%	5%		6%		
<b>North Dakota</b>		7%	7%			
<b>Utah</b>	9%					
<b>Washington</b>	15%	14%	11%	12%	10%	11%
<b>Wyoming</b>	5%	5%	5%	6%	6%	

## Summary & Recommendations

Life stages as defined in this report separated visitor groups who traveled with children under 18 from the other adult groups who were further segmented by age. One travel group, the adult mixed-age group contained people with ages that spread between the artificial age separations that we assigned to achieve distinct groups (no overlap) for analysis. However, even with this constraint, differences between groups were found. Descriptions of each age group are written below. Please note that we simply left off the mention of scenic driving as an activity since every life stage group had that at the top of their list of activities.

**Groups with Children:** These visitors were most likely to come from Washington, Idaho and Utah, and had the second highest household income levels of the six life-stage groups. This group was more likely to be traveling with someone who had never been to Montana in the past. As they were most likely a family on vacation, they stayed in hotels/motels, homes of friends or relatives, and were the life stage group who stayed in a rented home or cabin more than the other life stage groups. Searching on the internet for travel plans was common among this group but not looking for any information before the trip was also common (most likely those visiting friends/family). While in Montana, however, they used map applications, mobile apps, visitor centers, brochure racks, and sought out information from employees. They traveled to visit Yellowstone, Glacier and/or family friends in Montana and were very active while visiting. They spent five nights so they could get in all their activities (day hiking, wildlife watching, nature photography, camping, visiting historic sites and museums). These travelers were more likely than the other groups to go river rafting/floating and horseback riding. Groups with children spent \$1,064 on their trip in Montana with their top three spending categories being restaurant/bar, guided trips, and Licenses/entry fees. This was the highest spending group of the six life stage groups.

**18-35 years old w/o children:** This life stage group is most likely to be from Washington, and in lesser numbers from California, Idaho, Colorado, North Dakota, Minnesota, and Wyoming. One third of this group is simply driving through the state while another third is here on vacation. This group has the lowest household income of all groups and spends the least amount of time and money in Montana compared to the others. Half of their trip money (\$508) was spent on fuel, restaurants/bars, and licenses/entry fees. Over 2/3 of nights spent in Montana by this group are in the home of a friend or relative. They are also the most likely group to spend nights in public campgrounds. They either do not use any trip planning sources or go on the internet almost exclusively for information. While in Montana they depend on map applications as their main information source. Yellowstone, Glacier, and hot springs are the most visited spots while in Montana but they are also attracted to Montana to visit their friends and relatives. This group is active in day hiking, nature photography and visiting local breweries. They visit breweries significantly more than the other life stage groups and visit distilleries as well as backpack slightly more than the other groups.

**35-54 years old w/o children:** Idaho and Washington are the top residences of this life-stage group but they also fare from California, Alberta, North Dakota, Colorado, and Wyoming. This group is most likely on vacation or here on business, which likely contributes to it being the travel group with the smallest group size of all life stages. They have household incomes above \$100,000 which is the highest income group but have the second lowest length of stay and trip spending in Montana. Nearly half of their trip money (\$772) is spent on fuel, restaurants/bars, and licenses/entry fees. This group spends more nights in hotels or motels compared to other life stage groups. Most don't use any information sources for

planning, likely a reflection on the number of business trips in this age group. While in Montana they use map applications and are the highest user group of mobile apps. Visiting Yellowstone and Glacier are at the top of their sites to see, followed by being attracted to mountains and forests. About one third are active in day hiking, wildlife watching, nature photography and recreational shopping. Nearly one quarter will visit a local brewery.

**55-64 years old w/o children:** This age group was most likely to be from Washington, followed by Idaho, Alberta, Minnesota, Wyoming, California, and Colorado. Household income is distributed equally in the middle ranges of \$50K to \$75K, \$75K to \$100K, and \$100K to \$150,000 but they had the second lowest total trip spending of the life stage groups. They were most likely in Montana for vacation or just passing through. Half of their spending was on fuel, restaurants/bars, and retail goods. This group spent most nights in hotels or motels followed by the home of a friend or relative. These visitors are the least likely of the life stage groups to use any sources of information for trip planning and once here, they are the most likely to use map applications for information sources. The three main attractions for this group are Glacier, Yellowstone, and mountains and forests. They are slightly more likely to visit Montana state parks than other groups. This group is active, but not overly active in any one activity. They are slightly more likely to visit art exhibits and participate in motorcycle touring than the other groups.

**65 and older w/o children:** This age group represented fewer states than other groups, but Washington, California, Idaho, Alberta and Wyoming residences make up the largest segments. These 'retirees' had the second lowest income level, only higher than the 18-34 year olds w/o children and while they spent the most nights in Montana, their spending was second lowest of all the groups. Half of what they did spend was on hotel/motels, fuel, and restaurant/bar, and yet they were still the group most likely to camp in private campgrounds. They visited the national and state parks and cited car or RV camping as one of their main activities. While this group did not respond to many trip planning sources used, they were the only group who might be more inclined to use an automobile club like AAA to help in their planning. While in Montana, they were more likely than other life stage groups to stop at visitor centers and use brochures from racks.

**Adult mixed-age group w/o children:** Any adult age range could be in this group since it was based on the cut-offs used to analyze the data. It could be two twenty-somethings with their parents, or it could be a 54 yr. old with a 55 yr. old. It is the most diverse age set of all the life stages. They were predominantly from Washington, Alberta, Idaho and California. Similar to the 55-64 age group, their household income is distributed equally in the middle ranges of \$50K to \$75K, \$75K to \$100K, and \$100K to \$150,000. Unlike that group however, this mixed-age group was the second highest spending group and spent like the group with children mostly on restaurant/bar, a guided trip, and licenses/entrance fees. Also like the group with children, they were most likely to be here on vacation and would also visit hot springs along with Yellowstone and Glacier. Perhaps due to their mixed ages, no single activity stood out predominately over the other groups. They were active, but not significantly different. Trip planning sources were similar to the groups with children as well which include internet searches and national park information. A small segment of this mixed group used the official MT tourism website more than the other groups. While in Montana they used map applications, mobile apps and visitor centers for their primary information sources.

## Recommendations

These data were extracted to try to understand differences in market segments based on travel group ages with or without children. Based on spending alone, we would recommend marketing to groups with children and the mixed-age adult groups. These two groups spent the most per day and per trip, significantly more than the others. It also appears they spent more on local products or services (outfitter/guides and licenses/fees) keeping most of the money in state rather than seeping out immediately. Increasing the market share of these two groups would be economically advantageous to the state. Currently, groups with children only make up 14 percent of Montana's visitors while the mixed-adult age group is 20 percent of visitors. Together they represent 34 percent of Montana's visitor market. However, looking at the percent of spending for these two groups, it represents 44 percent of all spending in the state. These are high value visitors to Montana.

Visitor groups with children are more likely than any of the life stage groups (47%) to have at least one first time visitor to Montana on the trip (likely the children). However, 74 percent of the mixed-age adult groups were all repeat visitors. This provides some interesting results for the Office of Tourism and Business Development (MTOTBD) who tend to seek out first time visitors. It likely suggests that the MTOTBD should market to groups with children and strategically have the travel regions and CVB's market to the mixed-age adult groups. Ideally this encourages families to come to Montana which creates future visitors in those kids as they become adults and make return visits.

Finally, groups with children are more likely to travel in the summer months and perhaps during vacation times in the winter, but mixed-age adult groups are not as constrained to the school year. We recommend marketing to this mixed-age group for the shoulder seasons so they can experience less crowded venues. Providing these potential visitors with suggestions on when to visit the state and why, advocates that you know their needs and care about them.

This report is based on 2015 nonresident data. Changes in visitor types between years are usually very minimal if at all. Results in this report are an excellent representation of age group life stage segments and can be utilized into the future.